

# Our Privacy Policy

National Investors Michigan and its representatives are engaged in the business of providing financial, investment advisory and insurance services to its customers. In this capacity we operate as a state licensed insurance agency and/or investment advisory firm in the states in which we are properly licensed to conduct business.

National Investors, Inc. recognizes that protecting the privacy and security of the confidential information we collect about you is an important responsibility. The following information will help you understand our privacy policy and how we handle and maintain confidential personal information as we fulfill obligations to protect your privacy. "Personal Information" refers to the nonpublic financial and personal information obtained by us in connection with providing you a financial product or service. In the event you terminate your customer relationship with us, or become an inactive customer, we will continue to adhere to the policies and practices described in this notice.

## **Information We Collect About You**

To help the federal government fight the funding of terrorism and money laundering activities, federal law requires all financial institutions to obtain, verify and record information that identified each person who opens an account.

What this means for you: When you open an account, we will ask for your name, address, date of birth and other information that will allow us to identify you. We may also ask to see your driver's license or other identifying documents.

We collect personal information to help us serve your financial needs, offer new products or services, provide customer service and fulfill legal and regulatory requirements. The type of information that we collect varies according to products or services involved, and may include: Information we receive from you on applications and related forms; and Information about your transactions and relationships with us, our affiliates or with non-affiliated third parties.

## **Information We Disclose About You and To Whom**

We do not disclose nonpublic personal information about current or former customers to any non-affiliated third parties unless required by law, or for certain limited purposes as permitted by law. In the normal course of business, personal information may be shared with persons or entities involved in servicing and administering products and services on your behalf, including: your consultants, a clearing broker, third party custodians or administrators, outside investment advisors or any other named fiduciary of your account or other service providers and affiliates assisting us.

## **We Protect Your Information**

We maintain strict practices and procedures to limit access to personal information to those employees and service providers who need to know such information in order to perform business services on your behalf. We educate our employees on the importance of protecting the privacy and security of confidential personal information. We also maintain physical, electronic and procedural safeguards that comply with federal and state regulations to safeguard your personal information. We will update our policy and procedures where necessary to ensure that your privacy is maintained and that we conduct our business in a way to fulfill our commitment to you. If we make any material changes in our privacy policy, we will make that information available to customers through our website at [www.nationalinvestors.net](http://www.nationalinvestors.net) and/or other communications. If you should have any questions or concerns regarding our policy, please contact us at 1(877) 452-3522 or via email at [scott@nationalinvestors.net](mailto:scott@nationalinvestors.net).